WIA Dislocated Worker
Toolbox 2.0 Desk Aid

Enrollment

After receiving the customers eligibility documentation as required in the Policy and Procedure Manual the case manager should proceed to enroll the customer in Toolbox 2. All job seeker information must be completed before proceeding to the eligibility screen. Working with the customer completed the appropriate Assessment Screens to assist the customer in identifying employment related strengths and weaknesses. Each customer's circumstances will vary based on their education and experience not all of the assessment tools will be necessary for every customer.

Before WIA services can be provided the Eligibility screen must be completed.
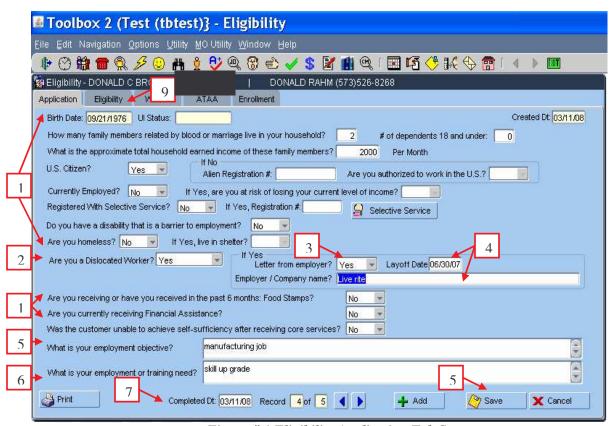Select the application screen.

Figure # 1 Eligibility Application Tab Screen

Step-by-Step:

1) Complete the following questions on Application Tab Screen:
   - US Citizen? In No, Alien Registration number. Are you authorized to work in the US?

- Currently Employed? If Yes, are you at risk of losing your current level of income?
- Registered with Selective Service?
- Do you have a disability that is a barrier to employment?
- Are you homeless? If Yes, live in a shelter?
- Was the customer unable to achieve self-sufficiency after receiving core services?

2) If the customer is a Dislocated Worker, at the question "Are you a Dislocated Worker?" select yes from the dropdown box.
3) At the questions "Letter from employer?" if the customer has a letter from the employer select "Yes" from the dropdown box.
4) Enter layoff date in the text box and enter the Employer/Company name in the text box.
5) Discuss with the customer to develop employment objectives to list in the "Employment Objective" text box.
6) Discuss with the customer their employment or training needs and enter in the "Employment and Training Needs" text box.
7) After completing all required information enter a Completed Date by double clicking on the text box; the current date will populate in the text box.
8) Click the Save button. The system will let the case manager know if any fields were missed.
9) Select the Eligibility Tab.

Eligibility Tab Screen

The Eligibility tab screen is used by the case manager to determine if the customer meets the eligibility requirements for WIA funded training programs.
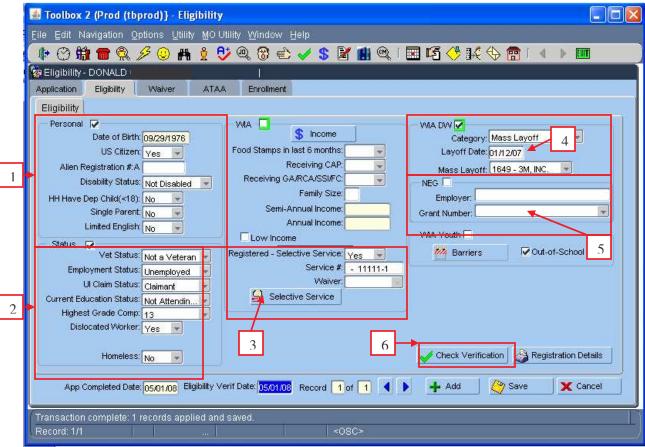

Figure # 2 Eligibility Screen
Eligibility Tab Screen

Step-by-Step:

1) Complete the following questions in the Personal section:
   - Date of Birth
   - US Citizen
   - Alien Registration number (if applicable)
   - Disability Status
   - Have Dependent Child under 18
   - Single Parent
   - Limited English
2) Complete the following questions in the Status section:
   - Veteran Status
   - Employment Status (If you are attempting to enroll a customer who has received notice of a pending layoff and is still employed by the company select "Yes".)

- UI Claim Status
- Current Education Status
- Highest Grade Completed
- Dislocated Worker (If trying to determine Dislocated Worker status, indicate "Yes")
- Homeless

3) Enter selective service information if customer is not required to register for selective service select No waiver from the Waiver box.

4) In the WIA Dislocated Worker section click on the Category text box and select appropriate category from the dropdown box. Enter the Layoff Date in the text box. If the customer was involved in a mass layoff click on Mass Layoff text box and select appropriate company from the dropdown box. This will add the worker to the list of workers from that employer.

5) If the workers employer is in an approved National Emergency Grant (NEG) double click on the text box and select the employer from the list of values. Select the appropriate Grant Number from the dropdown box.

6) It is not necessary to complete the WIA Youth section. After all appropriate eligibility boxes are completed select Check Verification button.

Check Verification Screen

The Check Verification screen is required to enroll any customer in WIA services prior to providing WIA funded services.
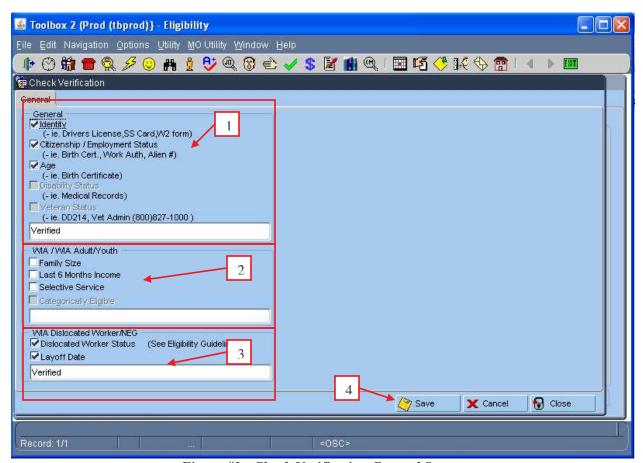

Figure #3: Check Verification General Screen

Step-by-Step:

1) Check all boxes where the case manager has verified actual documentation in the General section and enter a note in the free form box.
2) It is not necessary to complete the section on WIA/WIA Adult/Youth.
3) Select verification of WIA Dislocated Worker/NEG and provide a note in the Free Form box.
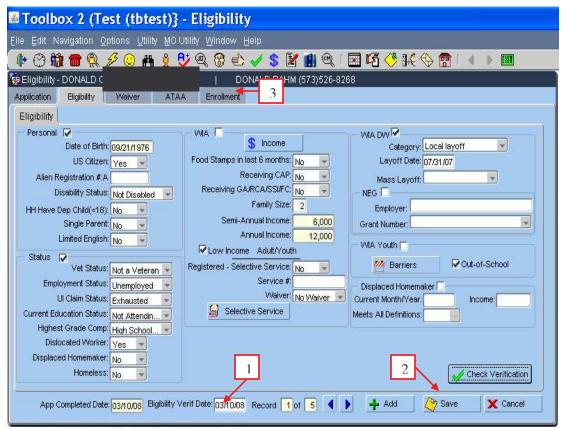4) After completing, click on the Save button and return to the eligibility tab.

Figure # 4: Eligibility Screen
Eligibility Tab Screen

Step-by-Step:

1) Double click on the Eligibility Verification Date; current date will populate field.
2) Click on save button
3) Select Enrollment Tab.

Enrollment Tab Screen

The Enrollment Tab screen is used to enroll customers in programs they are eligible and qualified for. The Eligible Enrollments section list programs that pass eligibility requirements. Case managers determine if the customer is appropriate to participate. The Other Potential DWD Programs list programs that do not require use of eligibility screens or a partner system to determine eligibility. Eligibility requirements are determined for each individual program and some may require WIA registration. The actual Enrollments section shows the program(s) the customer is actually enrolled.
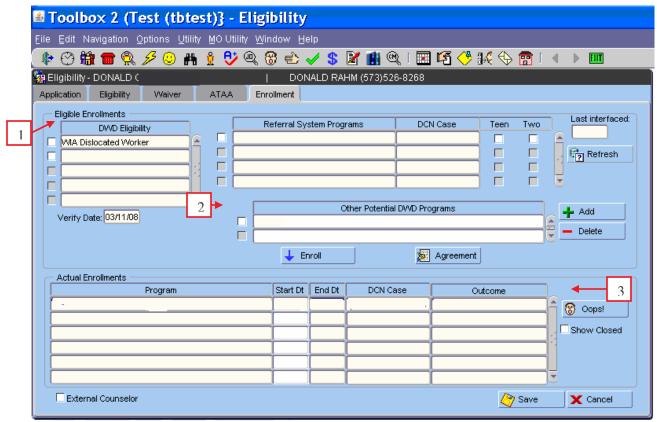

Figure # 5 Eligibility Screen
Enrollment Tab Screen

Step-by-Step:

1) For Eligible Enrollments check the box next to the program and click on the Enroll button to enroll.
2) For Other Potential DWD Programs double click on the field select the program from the list of values and check the box next to it. Some programs may require additional information and the system will lead you through it. Click the Enroll button.
3) The Oops! button can be used to un-enroll an actual enrollment when an enrollment has been made in error. The Oops! Button ONLY works the day of enrollment.

EMPLOYMENT PLAN

The Employment Plan is required for all intensive services. The Employment Plan is developed in agreement with the customer.

Enrollment Tab Screen

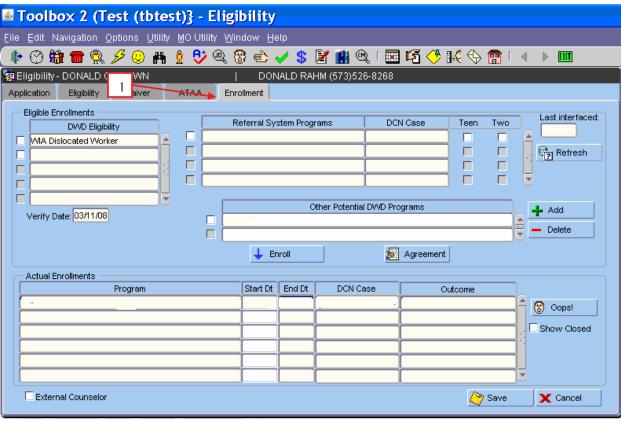The Enrollment tab screen is a duplicate of the Enrollment Tab on the Eligibility screen.

Figure # 6: Employment Plan Screen
Enrollment Tab Screen

Step-by-Step:

1) The Enrollment Tab can be used to enroll customers that have been determine eligible for the listed programs

Appropriateness Tab Screen

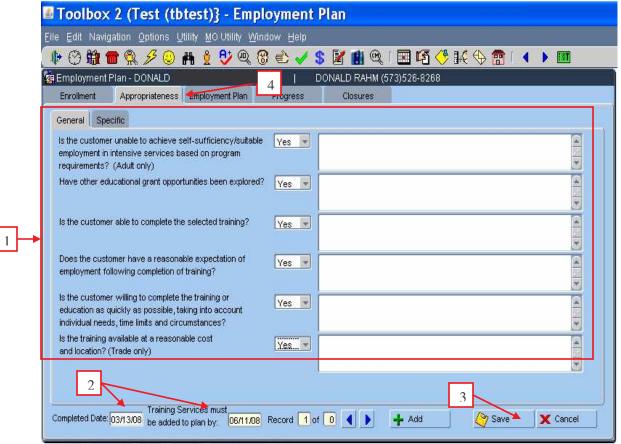The Appropriateness tab screen must be completed to determine if a customer is appropriate for training programs.

Figure #7: Employment Plan Screen
Appropriateness Tab Screen

Step-by-Step:

1) Complete the Appropriate General question and provide a brief description in the free form text box of the circumstances related to the issue.
2) Enter completed date by double clicking in the text box. The Training Services must be added to plan by date will populate. If training services need to be entered after the date this screen must be completed again.
3) Click the Save button.
4) Click on the Employment Plan tab.

Employment Plan Tab

The Employment Plan tab is a tool the case manager can use to outline a plan to help the customer achieve financial independence.
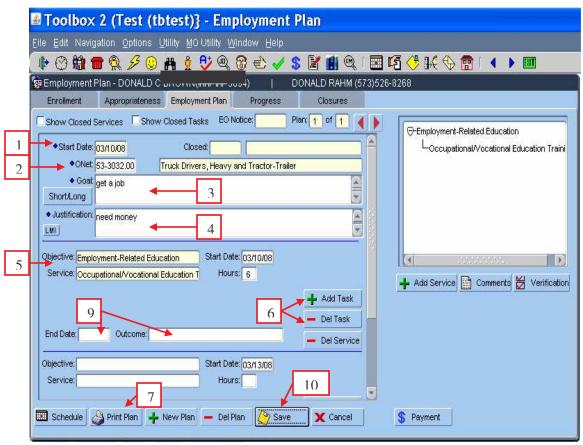Required fields are Start Date, ONET, Employment Goal, and Justification

Figure # 8: Employment Plan Screen
Employment Plan Tab Screen

Step-by-Step:

1) Enter Start Date of plan.
2) Enter O*Net code by double clicking on the text box to search O*Net system to locate code.
3) Use free form text box to enter the customer's Goal
4) Enter a "Justification" to explain the employment plan goal in the text box.
5) Enter an "Objectives" and a "Services" by double clicking in the text box for a list of values. Use "Objectives" and "Services" to build the outline of the plan. Use the Employment Plan Tree to go to specific objective or service by clicking on the objective or service desired. Objectives/Services can be closed when the customer has completed all the tasks related to the objective/service. Additional Objectives may be added by selecting New Plan button. Click the "Add Service" or "Del Service" buttons to add or delete objectives/services.

6) Once Objectives and Services are selected; a "Task" text box will appear. **"Tasks"** allow more specific detail about how the customer will meet each Objective/Service. Tasks are used to detail how the customer will achieve each section of their employment plan. Tasks can be set as completed (Y) or not completed (N). Click the "Add Task" or "Del Task" buttons to add or delete tasks.
7) Once Plan is complete press the Print Plan button to print a copy of the plan for appropriate signatures. *(See Figure 10)*
8) Plan will be displayed in Adobe for printing
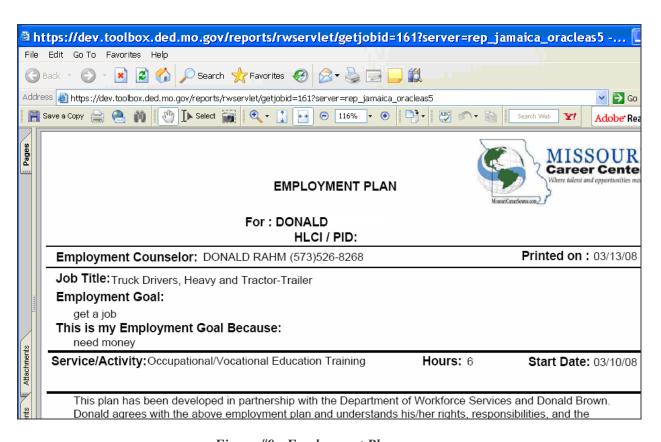9) Upon completion enter End Date and Outcomes
10) Click the Save button.

Figure #9: Employment Plan

Progress Tab Screen

The Progress Tab screen is used by the case manager as a monitoring tool. This tab is also used to specify the name of the Training Institution and Training Program.
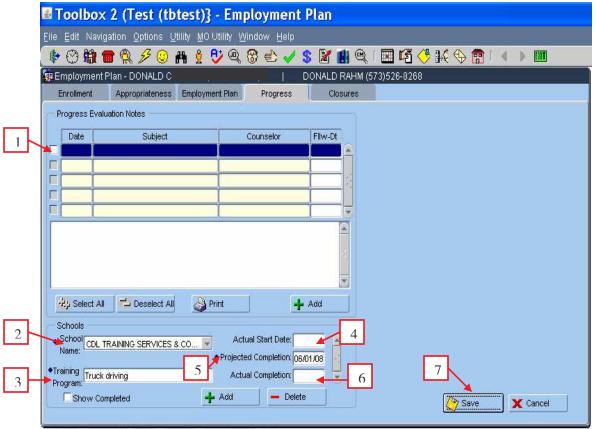

Figure # 10: Employment Plan Screen
Progress Tab Screen

1) Add progress notes by checking the available blank check box then complete the line and enter Information in the free form box. Progress notes can be viewed, added, or a print out can be created.
2) The Schools section of the screen displays the School Name where the training is provided.
3) Enter Training Program the customer is in.
4) Enter the Actual Start Date.
5) Enter the Projected Completion date.
6) Once training is completed, enter the Actual Completion dates.
7) Click on the "Save" button

Closures Tab

The Closure tab screen allows the Case Manager access to close services, enrollments and the employment plan from one screen.
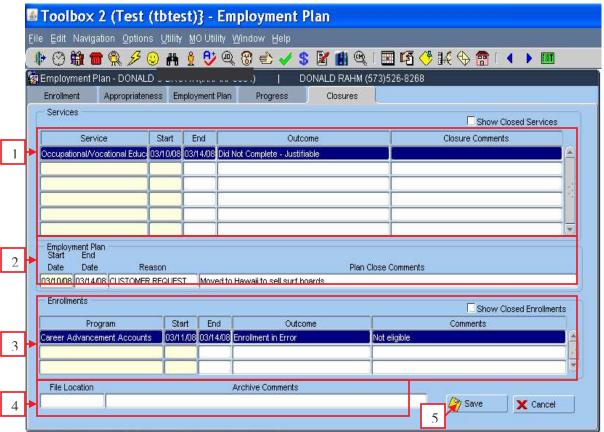

Figure # 11: Employment Plan Screen
Closures Tab Screen

1) The Services section displays all of the open services for the current employment plan.
2) The Employment Plan section only displays the employment plan start date. To close the plan, enter the End Date and Reason for closure. The Plan Closure Comments field is optional and Reason is selected from a list of values. Employment plans cannot be closed if there are open services.
3) The Enrollments section displays all of the open enrollments. To see closed enrollments click the Show Closed Services box. To close enrollment enter an End Date and Outcome. The Comments field is optional and Outcomes are selected from a list of values.
4) The File Location and Archive Comments section is used to identify the location of cases. The information aide's workers looking for case file that closed in the past and now are re-opening.
5) Click on the Save button.

Seeker History

To view the services that a Job Seeker has received click on Seeker History. Seeker notes can be displayed from the <u>Notes tab screen in the Seeker History</u>. This allows the case manager to view the notes or use the Print button and print some or all of the notes. New notes cannot be entered from this screen.
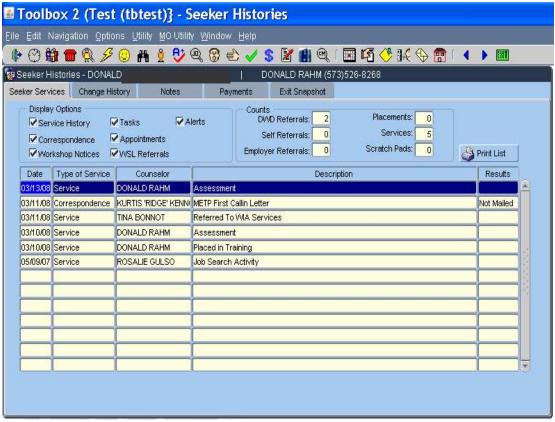

Figure # 12: Seeker Services Screen